

## **The Middle East to 2020**

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The major influences, or “drivers,” that were identified in *Global Trends 2015* have been affecting Middle Eastern events for some time and will continue to do so, to varying degrees, over the next decade and a half. In addition to sharing with other regions the effects of these worldwide influences, Middle Eastern affairs between now and 2020 will be shaped by the heavy hand of the region’s own history and the peculiar legacy of conflicts, suspicions, and attitudes this history has left.

- **Demographics** will affect the Middle East mainly through the continued rapid population in several regional states, with the strains this growth places on urban services and the ability of economies to generate needed jobs. “Youth bulges” are likely to persist in several Middle Eastern countries, and unemployment and underemployment among young adults will spell discontent in the age cohort most susceptible to political radicalization. A few states will make at least partially effective efforts to control population growth—emulating those, such as Iran, that already have made progress in that regard—but the needed leadership for such efforts is likely to be too spotty for effective population control to be a region-wide trend.
- An abundance of fossil fuels and a scarcity of water necessarily make **natural resources and the environment** a major part of the Middle Eastern story, now and for at least the next couple of decades. Oil and gas will be the mainstays of the region’s economy in the absence of alternative engines of growth and income on the horizon. By 2020 the different consequences for economics and economic policy of the country-by-country differences in energy reserves and depletion rates will be more apparent than now. The interests of those with more rapidly depleting reserves (such as Bahraini and Iranian oil) will diverge increasingly from those with longer-lasting resources (such as Saudi oil and Qatari gas). Increased consumption of water as a result of population growth will make conflict over that resource increasingly acute between those who share aquifers (e.g., Israel and the Palestinians) or river basins (e.g., Turkey, Syria, and Iraq).
- **Science and technology** will be an influence in the Middle East mainly because of the role of information technology in facilitating the spread of news, information, and ideas. That spread will in turn affect political trends and political volatility in several ways, including popular reactions to emotion-laden events and the diffusion of ideologies, including extremist ones. Other scientific and technological advances, such as biotechnology and materials technology, will have less impact on people in the Middle East than in some other regions.

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- The impact on the Middle East of the strictly economic side of the **global economy and globalization** will be hard to distinguish from issues of energy markets—the principal link between the “natural resource” issue and the region. Vibrant economic growth in other regions will have an indirect negative effect on the politics of many Middle Eastern states by providing an unfavorable comparison and thereby feeding envy and impatience with ruling elites. In some countries, however, it may be a stimulus to more progressively minded elites to be more assertive and to take greater risks in pursuit of economic reforms. The increased cross-cultural contacts accompanying globalization will engender a potentially destabilizing mix of emulation and resentment.
- **National and international governance** is in some respects the “driver” that carries the most weight for the Middle East, because the story of failure and crisis in the Middle East will continue to be largely a story of ineffective governance. More specifically, this means the failure of political systems to articulate and aggregate a range of views and interests, and the failure of regimes to move beyond stultifying patronage politics and beyond the minimum necessary accommodations to retain power. In most Middle Eastern countries a centralized state apparatus will remain the dominant actor in public affairs, with tribe and family retaining significant influence at the local level. A civil society worthy of the name will be more apparent in some Middle Eastern states in 2020 than it is now, but overall it will continue to be overshadowed by the state above and the village below.
- The shape of **future conflict** also will be an important aspect of Middle Eastern affairs over the next 16 years, because of an abundance of intense animosities that will continue to rival the region’s abundance of energy resources. Those resources also will provide the wherewithal for states to arm themselves with more advanced weapons as military technology progresses. Such weapons may include weapons of mass destruction, the proliferation of which will be a problem involving the Middle East at least as much as any other region. Enhancement in the arsenals of regional states will threaten to intensify conflicts between states in the region as well as conflicts involving the United States.
- The **role of the United States** will be critical in shaping Middle Eastern events between now and 2020. The United States is the dominant military power in the region and, according to plans of the current administration, intends to remain so for an indefinite future. It is, by nearly universal agreement, the one state with at least a decent chance of moving Arabs and Israelis out of their dead-end conflict. It is the forger of a new political and economic system in Iraq. It is the principal security guarantor of several Middle Eastern states and the principal *bete noire* of several

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others. And it is the main source of an alien culture that is admired by many Middle Easterners but disdained by others.

The principal set of influences affecting Middle Eastern affairs that probably is not adequately captured by this list of “drivers” has to do with how people in the region identify themselves and distinguish themselves from others. Put differently, how will the major fault lines of conflict be drawn, and how will Middle Easterners tend to distinguish “us” from “them”? Will it be primarily on the basis of religion, ethnicity, nationality, class, tribe, or something else? Religion, and specifically Islam, has increasingly become the prime identifier in recent years. Whether it continues in that role (see below) or not, the question of identity will be a major influence on regional events. A continued emphasis on Islam as an identifying attribute would color regional politics, define possible major regime changes, set limits on economic and social policies, and help define relations with outside powers. Conversely, the supplanting of religion as dominant identifier would itself be a major change. The change would be unlikely to take the form of a gentle drift into liberal democracy; more likely it would involve the rise of a new identity of protest and opposition.

### **Change and Continuity**

The amount—and sources—of change likely to occur in the Middle East over the coming 16 years can be gauged partly by looking backward over the same amount of time, or perhaps twice or three times as much time. And while the region unquestionably has seen some major redirections and jarring events in that recent past, they have occurred against a backdrop that has exhibited at least as much continuity as change.

Petroleum is part of that backdrop. The muscle-flexing by OPEC, the oil price shocks of the 1970s, the huge transfers of wealth from consumers to producers, and the more recent difficulties that Middle Eastern producers have had in managing the oil market have entailed important changes to the region. But they have been important because of the continuing large role that the petroleum trade plays in the Middle East.

The conflict between Arabs and Israelis has been another major, and depressingly constant, factor in Middle Eastern affairs. This has been true ever since the creation of Israel more than half a century ago, but especially since Israel’s conquest of Arab lands in the 1967 war. The most promising attempts to break out of that conflict have included some of the most significant and surprising regional events. But the constant elements of antagonism and distrust have repeatedly brought the Arab-Israeli story back into familiar ruts. Sadat’s journey to Jerusalem led to an Egyptian-Israeli accord that could have been pathbreaking but was not (with only the Jordanians having since followed suit) and now is little more than an armistice with guarantees. The Oslo accords were potentially the greatest departure in Arab-Israeli history—addressing the Israeli-Palestinian conundrum

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that is at the core of the larger conflict between Jews and Arabs—but they have broken down. More to the point, they have broken down not because of new problems or bad surprises but rather because of the old antagonism and distrust.

The political role of Islam has become another pervasive and probably long-lasting element in Middle Eastern affairs, although the modern version of it has not been an obviously (to outside observers) large determinant of regional events for as long as oil and the Arab-Israeli conflict have been. Political Islam has had its current salience for the past quarter century, since the Iranian revolution. The changing shape over the past half century of the discourse of political opposition in the Middle East—passing through secular Arab nationalist and leftist phases before giving way to its currently dominant Islamist coloration—suggests the potential for still more mutation between now and 2020. There is good reason to believe, however, that the current coloration will be longer lasting. Nasser's brand of Arab nationalism was the product of a particular post-colonial moment, and the leftists were the legatees of the now-discredited Marxist experiment, support for which always depended on performance unaided by spiritual yearnings. Modern political Islam actually is a product of 13 centuries, not just a quarter century, of such yearnings. The core concept of the radical Salafi brand of political Islam is a return to earlier roots.

These contours of modern Middle Eastern history suggest a couple of conclusions. One is that there is likely to be considerable continuity between the present and 2020—bearing in mind, of course, that such a conclusion always is the easiest projection to make about anything, and does not represent what is most useful about a futures exercise. The point is only that the turbulence of what is undeniably a turbulent region should not lead us to overlook how strong are certain currents flowing underneath the churning surface. A second conclusion is that those changes, including major changes, that do occur in the region during the next decade and a half are more likely to result from existing forces reaching some breaking point than from new variables affecting the region for the first time.

A major caveat to any projections about change in the Middle East in the coming years is that everything depends heavily on the United States. Many of the directions Middle Eastern events have taken during the past several decades have depended on US action (e.g., Camp David, Operation Desert Storm, Operation Iraqi Freedom) or inaction. The Middle East now plays, and is likely to continue to play, at least as large a part in US foreign policy discourse as ever before.

### **Major Trends**

The following four trends are especially likely to shape events in the Middle East between now and 2020.

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**Breakdown of the social contract between rulers and ruled.** Regimes in the region will find it increasingly difficult to live up to their part of an implicit bargain with their populations: to provide economic (and physical) security in return for the people forgoing a meaningful political role and overlooking corruption and economic privileges enjoyed by ruling elites. That difficulty, and popular responses to it, will reflect several influences, including population growth outstripping the ability of economies to generate new jobs, mass media increasing awareness of political and economic alternatives, and the uneven effects of globalization making it at least as much a source of resentment as an engine of prosperity.

This breakdown has the potential to bring about major political change in several countries, either revolutionary or peaceful. It is difficult, however, to identify tipping points, because political change will require other catalysts besides popular discontent. Iran, for example, almost certainly will undergo significant political change between now and 2020, and probably will become a more liberal and more democratic country. It is uncertain, however, what—or who—will lead Iranians to throw off their current lethargy and effect such change. Saudi Arabia is another important country where the regime/populace bargain seems unlikely to be sustainable for another 16 years, but that statement says nothing about the nature or direction of whatever political change does occur.

**Extremist violence turns inward.** More of the political violence in the Middle East, including terrorist violence, is likely to be aimed more directly and conspicuously at the area's regimes than it is now. (This does not necessarily mean that terrorism against US and other Western targets will lessen at the same pace.) This trend is related to the one just mentioned, and not just in the sense that increased popular discontent will partly take the form of extremist violence. Another part of the bargain between some regimes and their citizenry is that any political violence would be directed outward, against Israeli, Western, or other targets. Increased international pressure on some regimes to take more comprehensive and effective counterterrorist measures will make it harder for those regimes to condone or overlook such outward-looking terrorist-supportive behavior. This will combine with other elements of popular dissatisfaction to make attacks on the regimes themselves more frequent.

Terrorism alone will not topple regimes, but more peaceful opposition will play off it, and it could precipitate more broadly based political change. In several Arab countries the feasible alternatives to existing regimes will be moderate Islamists and radical Islamists. Responses by regimes will be variable, ranging from increased repression (which sometimes, and in most cases eventually, will fail) to varieties of co-optation.

**Weapons proliferation.** Advanced weapons, including perhaps nuclear weapons, probably will be more widespread in the Middle East in 2020 than now.

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International efforts to check the proliferation of weapons will slow, not stop, their spread. Most of the principal motives for acquiring nuclear or other advanced weapons will persist even after changes of regime. In some cases, added insecurities associated with a change of regime may even increase the incentives to proliferate. In Iran, a change of regime might ease Western concerns about nuclear weapons in the hands of mullahs but would not erase a more broadly based Iranian view that such weapons would be an appropriate accoutrement to Iran's status as the dominant regional power.

Peace agreements would not by themselves remove the causes of proliferation. An Arab-Israeli settlement probably would be a "cold peace" akin to the current Egyptian-Israeli relationship. Israel almost certainly would retain its nuclear arsenal, and that would weigh heavily on national security decisionmaking in other regional capitals.

Ironically, some of the most significant proliferation might involve moderate states such as the current Saudi regime rather than "rogues" such as Libya or Syria. The former will seek ways to ensure their security without overly heavy reliance on the United States. The latter will seek to escape the opprobrium of being "rogues" and to be fully rehabilitated as members of the international community.

**New ties with outside powers.** There will be strong reasons for states both outside and inside the Middle East to explore new relationships with each other. For the outsiders, oil and money are reasons enough to want to be engaged, in addition to any other political or security-related reasons that specific powers may have. Regimes inside the region will look for security support and sources of arms and technology, while trying to avoid overly close relationships that could be a political liability with their own populations.

Foreign relations for Middle Eastern states will exhibit considerable volatility. This is partly because their objectives in forging new relationships will be somewhat contradictory. (In particular, the United States could be seen as both the strongest possible guarantor of security and the most politically unpopular patron.) It also is because the region's foreign relations are in some ways still sorting themselves out from Cold War-era patterns. There could be some increased polarization between those who throw in their lot with Washington and those who do not.

### **Shocks**

Although some of the biggest events in the Middle East between now and 2020 may come out of the blue, most of the shocking and unpredictable events are likely to be perturbations in what already are known to be major regional issues.

**Arab-Israeli conflict: war or peace.** The conflict plays such a large role in regional discourse that any sharp departure from the current standoff would have

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substantial regional repercussions. Departures could take either of two opposite directions.

One would be the outbreak of a new war between Israel and one or more Arab states, especially Syria. Neither side would seek a war, but there will be continuing potential for an unintended outbreak of hostilities, stemming perhaps from confrontation in the Shaba Farms area where Lebanon, Syria, and Israel meet. A new war might entail use of CBRN weapons, possibly initiated by Syrian employment of chemical weapons. A war would undo whatever amelioration of anti-Americanism there might have been in the Arab world. It also would torpedo any ongoing efforts to advance or resurrect an Israeli-Palestinian peace process, although it could also serve as a catalyst for new outside mediation efforts. Another crushing Arab military defeat at the hands of Israel would exacerbate the disillusionment of Arabs with their ineffective regimes.

The opposite departure would be the conclusion of a final, comprehensive Arab-Israeli peace settlement, which seems so elusive now that it may deserve to be called a “shock.” Perhaps the death of Arafat—which is likely before 2020—would set in motion events leading to a settlement. Although an accord would be at least initially a “cold peace,” if it were regarded as acceptable to the great majority of Palestinians it would mean the biggest change in regional discourse since Israel’s creation. It would significantly affect attitudes toward the United States by negating the most frequently recited regional complaint against Washington. It also would be a moment of truth for several Arab regimes, which would lose their most effective distraction from their own shortcomings and major excuse for not facing up to needed reforms.

**Advent of a new radical regime.** The coming to power of a radical (probably, but not necessarily, Islamist) regime in a Middle Eastern state which currently has more moderate leadership could be an important cause as well as effect of some of the possible developments discussed above. As a consequence of popular dissatisfaction with existing governments, to have one or more revolutionary changes of regime somewhere in the region in the course of the next 16 years should not be surprising. But any single change will be a shock. That would be particularly true if the change occurs in an important state such as Egypt (the most populous Arab country) or Saudi Arabia (the wealthiest one). A new radical regime might go through an initial phase—as the Iranian revolution did—of seeking to foment similar revolutions in other regional states in the belief that it would need like-minded neighbors to survive. As such, a new radical regime could be a destabilizing force for the whole region.

At a minimum, it would shake up regional alignments, partly in unpredictable ways. Replacement of the Saudi regime by a radical Islamist successor, for example, might increase Arabian-Iranian tensions, with a rivalry for Islamic leadership (one party Sunni, and the other Shia) overshadowing whatever common characteristics would set both regimes apart from the al-Saud. Radical regime change would unavoidably affect relations with Washington and probably the US role in the region. It also would affect

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the Arab-Israeli equation—in a major way if the change of regime occurred in Egypt or Jordan.

**Major change in oil prices.** The heavy dependence of the Middle Eastern economy on the oil market means sudden changes in that market are bound to have significant regional repercussions. The effects of a major increase in oil prices might be hard to disentangle from the other effects of whatever caused the jump in price (which might be war or revolution in the Middle East itself). Increased oil revenues could weaken or at least postpone popular pressures for political and economic change in producing states, which might help stability in the short term but weaken constituencies for reform that would eventually be needed anyway. A drop in prices (perhaps reflecting moves toward alternative fuels in consuming countries) would naturally tend to have the opposite effects. A key question in that instance is whether fiscal crunches and further inability to meet popular demands for services would outpace any acceleration in reform that realistic leaders would be almost be forced to accept.

**Alternative outcomes in Iraq.** Although the effects that political change in Iraq will have on the rest of the region are sometimes overstated, the size and centrality of Iraq mean that events there are bound to have repercussions elsewhere in the region. That the United States has made the outcome in Iraq a matter of high stakes for itself will accentuate those repercussions, at least regarding the US role in the region and relations between the United States and regional states.

There is a broad range of possible outcomes in Iraq. Which would be “shocks” and which would not is a matter of definition, debate, and individual expectations. Probably the “non-shock” portion of the range would include all of the possibilities that could plausibly be described as largely democratic. Those possibilities could run from political systems having electoral elements combined with a heavy dose of patronage politics and negotiated power-sharing (something like today’s Lebanon) to a more democratic Switzerland-on-the-Tigris.

The principal possibilities outside that range are:

- ***A radical Islamist regime.*** The effects would be similar to the advent of such a regime in another major regional state (see above).
- ***A secular strongman*** (something like Tunisia’s Ben Ali, or Saddam without the brutality). This outcome would have some stabilizing aspects, at least in the short term. In the long run it would face many of the same challenges as neighboring states in trying to meet popular expectations, as well as representing a non-solution to the problem of apportioning power among Iraq’s sectarian and ethnic groups.
- ***Civil war.*** This would be very likely to draw in outside states, especially Turkey and Iran, with the danger of the conflict turning into an interstate war.

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- *Iraq breaks up.* In some respects, not forcing the different sectarian and ethnic groups in Iraq to share the same country would be more stable than some of the alternatives. But this possibility would raise many of the same concerns among—and invite intervention by—neighboring states, as well as almost certainly leaving dissatisfaction among some of those groups about the division of Iraqi resources.

Any of these last four possibilities would be seen as a major defeat for the United States, with corresponding negative consequences for US prestige and influence in the region.